Strategic Leadership Development Program

"Securing Future Leaders"

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GOALS

- To enhance awareness and understanding of "why" a succession plan

- To share advantages of succession planning

- To provide transit agencies with a model succession plan (that small and large can use)

- To explain why succession plans fail (help to avoid some of the pitfalls)

ASSUMPTIONS

- No one has all the answers

- We can always learn more

- One shoe doesn't fit all
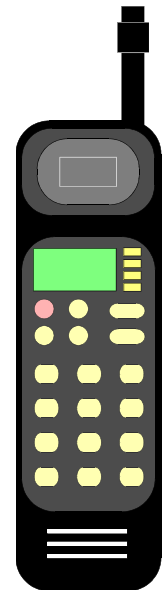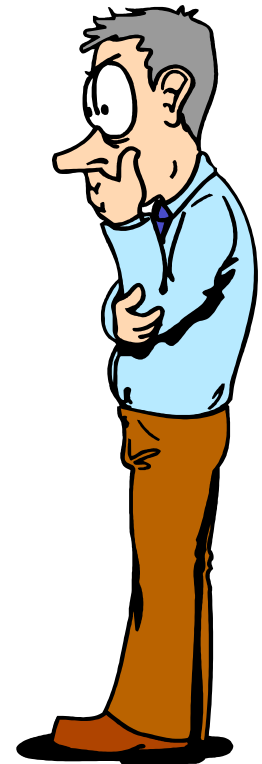
- We must keep an open mind
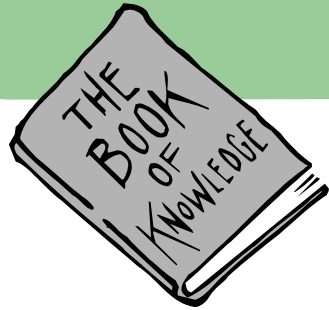
RESEARCH

- **Methods**

- **Where/What**
  - **Transit: Large and Small Systems**

  - **Regionally Diverse**

  - **Transit and Non-Transit**

CONSIDERATIONS

- **Retirements & Retirement Risk Analysis**
- **Strong Economy**
- **Mobility**
- **Supply**
- **Senior Staff Participation**
- **Supplying Data**

ADVANTAGES
OF SUCCESSION PLANNING

- **Ongoing supply of well trained people**
- **Alignment of needs with available resources**
- **Defined career paths**
- **Strong agency reputation to enhance recruiting**
- **Internal enthusiasm – "feel honored"**

OUTLINE FOR SUCCESSION PLANNING

- ## Why?

- ## Where are you?

- ## Where would you like to be?

- ## How are you going to get there?

- ## Where do you go from here?

STRATEGIC LEADERSHIP DEVELOPMENT PROGRAM

- **What is a Strategic Leadership Development Program (Succession Plan)**

  A proactive, long-term management level strategy for recruiting, selecting, and developing a core group of employees into supervisory/management positions.

PURPOSE & BENEFITS

- **Timely availability of experienced employees to fill leadership positions**

  - **Prepare current employees to lead your organization into the future**
  - **Help us "Grow our Own" leadership**
  - **Increase commitment and retention of management positions**
  - **Improve workforce capabilities and performance**
  - **Provide a formula of continuity and excellence for the entity**

OVERSIGHT

- **Executive Development Team**
  - **Typically senior management who:**
    - **Authorize the program**
    - **Make decisions**
    - **Select candidates**
    - **Serve as mentors and coaches**
    - **Review progress**
- **Program Administrator**
  - **Typically Human Resources or administrative personnel who:**
    - **Coordinate program to ensure completion and equity**
    - **Create training and development curriculum**
    - **Provide checks and balances and evaluates**

CRITICAL COMPONENTS

- **Strategic Planning**
- **Requires Relevant Skills, Knowledge, Abilities**
- **Essential Feedback**
- **Demand Excellence**

ACTION!

CORE TRAINING & DEVELOPMENT

- **With the help of incumbent(s), develop core competencies**

- **Guided by core competencies, develop curriculum**

CORE COMPETENCIES

Core competencies include:

- Professional integrity
- Leadership
- Decision making and problem solving
- Effective communication skills
- Knowledge of the entity
- High job performance

PROCESS STEPS

Gather Data

Solicit Participants

Conduct Assessments

Select Candidates

Provide Feedback

MENTORING, COACHING, COUNSELING

- **Management MUST serve as mentors and coaches**
  - **Mentors: Demonstrate essential skills, knowledge, abilities required of participants**
  - **Coaches: Apply intense leadership experience to train, direct and tutor participants – provide real life hands on involvement**

FILLING VACANCIES

- **"Pool of Qualified Individuals"**
  - **Leadership would first look to candidates in the program**
  - **Determine "readiness" - Select those ready to interview**
  - **Those not selected are counseled**
  - **Expectation: Over time, most participants will be placed in vacant targeted positions**

DISCLAIMERS

Selection for the Strategic Leadership Development Program does not guarantee a promotion. Performance in developing needed competencies is a key determining factor for promotion.

EMERGENCY SUCCESSION PLAN

- **Has your Board designated someone within your organization to serve as the Interim GM/CEO in the unfortunate instance of death, incapacity, removal of incumbent?**

- **It is suggested that during the annual strategic plan review, the Board designate someone to serve in this capacity.**

WHY PLANS FAIL

- Management unwilling to commit to long term planning
- Lack of formal written plan
- Plan is too rigid, inflexible or complex
- Perception of costs involved
- Breakdown in support for the program
- Too long a wait for real movement
- Selection of unqualified or unmotivated people

REGIONAL APPROACH

- **WSTA Support – Executive Development Team (EDT) developed from representatives of several systems**

- **EDT agrees to core competencies for like positions**

- **WSTIP – Training Coalition**
  - **Coordinates curriculum needed based on core competencies**

- **Willingness to lose or move employees**

Example – Intercity Transit

- **Statistics**
  - **227 Employees**
  - **127 50 Years & Older**
  - **62% Eligible to Retire in 1-15 Years**
  - **6 of 7 SMT Can Retire Within Next 10 Years (86%)**
  - **53% of Supervisors Can Retire Within Next 10 Years**

Summary

- **Can you afford not to plan?**
  - Continuity of agency
  - Excellences in established programs
  - Avoid gaps in effective management
  - Cost of finding next generation of management